

**MODIFICATION #1  
TO  
CONTRACT NUMBER DGS-180713-VAL  
BETWEEN  
THE COMMONWEALTH OF VIRGINIA  
AND  
VALUCENTRIC, LLC**

This MODIFICATION #1 is an agreement between the Commonwealth of Virginia hereinafter, referred to as "State" or "Commonwealth" or "DGS" (Department of General Services), and Valucentric, LLC., hereinafter referred to as Valucentric, LLC. or "Contractor" relating to Contract #DGS-180713-VAL dated July 13, 2018, as amended hereinafter referred to as the "Contract" or "Agreement." This Modification #1 is hereby incorporated into and made an integral part of the Agreement. Except as specifically modified, all other terms and conditions of the Contract remain unchanged.

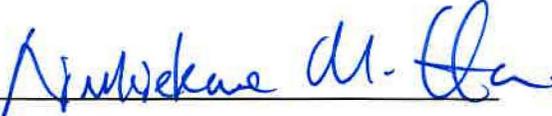
The purpose of this Modification #1 is to document both parties' agreement to extend the Contract. Following the Initial Term this Contract may be renewed upon the written mutual agreement of both parties for three (3) successive one (1) year periods, under the terms of the current Contract and with reasonable (approximately 90 days) written notice given prior to the expiration of the then current term.

**Reference:** Contract #DGS-180713-VAL "Special Terms and Conditions B" entitled "Renewal Of Contract". Both above referenced parties hereby agree to modify the contract to extend it for one (1) years from July 13, 2019 through July 12, 2020.

**ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED.**

**PERSONS SIGNING THIS CONTRACT ARE AUTHORIZED REPRESENTATIVES OF EACH PARTY TO THIS CONTRACT AND ACKNOWLEDGE THAT EACH PARTY AGREES TO BE BOUND BY THE TERMS AND CONDITIONS OF THE CONTRACT.**

VALUCENTRIC, LLC  
  
BY:   
NAME: Heather Placer, MAI, SRA, CCIM  
TITLE: Regional Vice President  
DATE: 7/10/19

COMMONWEALTH OF VIRGINIA  
  
BY:   
NAME: Niniekwe M. Harris, VCA  
TITLE: Contract Officer, OCP  
DATE: 7/10/19



# COMMONWEALTH of VIRGINIA

## SOLICITATION ~ OFFER ~ AWARD

### Non-Professional Services Sealed Invitation for Bid (IFB) for Appraisal Services

NIGP Commodity Codes:

91814 ~ APPRIASAL CONSULTING SERVICES • 94615 ~ REAL ESTATE APPRAISAL SERVICES •  
96866 ~ RIGHT OF WAY SERVICES

1. Contract #: TO BE ISSUED AT TIME OF AWARD	2. IFB #: TCW-2018-0416	3. Date Issued: April 16, 2018	4. Due Date / Time: May 15, 2018 / 2:00 P.M. EST
5. ISSUING OFFICE: Department of General Services Central Procurement Unit (CPU) 1100 Bank Street, Suite 724 Richmond, Virginia 23219		6. SHIP TO: As indicated on eVA Purchase Order	

### SOLICITATION

7. This is an advertised solicitation consisting of (1) the Purpose; (2) Scope of Work; (3) General and Special Terms and Conditions; and other provisions, representations, certifications, or specifications as per attached or incorporated herein by reference. **Sealed bids for furnishing the Services set forth in the schedule must be returned to the Issuing Office (Item #5 above.)** If hand carried, deliver to the CPU located on the seventh floor of the address indicated above. **Complete bids must be received prior to 2:00 P.M. local time on the Date Due/Time (Item #4 above.)** Bids will be publicly opened at 2:10 P.M. (local time), May 15, 2018, in the CPU Conference Room, 1100 Bank Street, Seventh Floor, Suite 724, Richmond, Virginia.

**OPTIONAL PRE-BID CONFERENCE:** An optional pre-bid conference will be held at 2:00 P.M. EST on April 26, 2018 in the DGS Central Procurement Unit, 1100 Bank Street, Suite 724, Richmond, Virginia 23219. See Section III for additional information related to this optional pre-bid conference.

**CLARIFICATION OF TERMS:** If any prospective Bidder has questions about the specifications or other solicitation documents, the prospective Bidders must submit questions in writing via email to [procurement@dgs.virginia.gov](mailto:procurement@dgs.virginia.gov) no later than 5:00 P.M. on May 9, 2018. **No questions will be answered by telephone.** Any revisions to the solicitation will be made only by an addendum issued by the Contracting Officer. Please include "IFB #TCW-2018-0416" in the title of the message. The addendum, if necessary, will be posted online at <http://www.eva.virginia.gov>. It is the responsibility of the Bidder to download the addendum.

**PERIOD OF CONTRACT:** One (1) year Initial Term Contract with four (4) additional successive one (1) year renewal options.

Issued by: Tiffany C. Walker, VCA  
Contracting Officer  
Email at: [tiffany.walker@dgs.virginia.gov](mailto:tiffany.walker@dgs.virginia.gov)

Tiffany C. Walker /s/  
Signature

### OFFER

In compliance with this Invitation For Bids (IFB) and all conditions imposed in this IFB, the undersigned firm hereby offers and agrees to furnish all goods and services required by this IFB, not to exceed the prices indicated in the Pricing Schedule and the undersigned firm hereby certifies that all information provided below and in any schedule attached hereto is true, correct, and complete.

8. Company Name: <u>Valucentric LLC</u>	Contractor's TIN: <u>47-0980453</u>
Address: <u>2361 Edgeview Lane</u>	eVA Vendor ID or DUNS No.: <u>DB0056159</u>
City/State/ZIP: <u>Midlothian, VA 23113</u>	State Corporation Commission No.: <u>n/a see addendum</u>
Signature: <u>[Signature]</u>	DSBSD Certification No.: <u>n/a</u>
Printed Name: <u>Heather Placer, MAI, SRA</u>	Telephone No.: <u>804-638-3330</u>
Title: <u>Regional Vice President</u>	Cell No.: <u>804-638-3330</u>
Date: <u>4/19/18</u>	Email: <u>hplacer@valucentric.com</u>

9. BILL TO: See Section VI: Method of Payment

### AWARD

10. ACCEPTED AS TO BID ITEM / CATEGORY NUMBERS: <u>Region 3,4,5,6,7,9</u>	11. AMOUNT: <u>\$95000</u>	12. AWARD DATE: <u>7/13/2018</u>
13. COMMONWEALTH'S REPRESENTATIVE: <u>Tiffany Walker</u>	14. COMMONWEALTH OF VIRGINIA By: <u>Tiffany C. Walker</u>	

NOTE: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against a bidder because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment. Faith-based organizations may request that the issuing agency not include subparagraph 1.e in General Terms and Condition C. Such a request shall be in writing and explain why an exception should be made in that Invitation to Bid.

AWARD POSTING: Upon the award or the announcement of the decision to award a Contract as a result of this solicitation, the Commonwealth of Virginia, through Virginia Department of General Services, Central Procurement Unit (CPU), will publicly post such notice online at <http://www.eva.virginia.gov> for a minimum of ten (10) days.

## BID FORM COMPLETION CHECKLIST

This IFB contains several portions, which should be completed and submitted with your bid in order for your bid to be responsive.

Please use the provided checklist below to ensure proper completion of your bid.

Required Items to be Provided with Bid	Bidder Acknowledgement (Initial below when action completed)
<b>1. Contractor Information</b> – Complete Bidder Information on Page 1 (#8 – Cover Page) (State Corporation Commission No. if not a sole proprietor and DSBSD Certification No. if certified). Original signature required.	hmp <hr/> Initial
<b>2. Authorized Representative</b> – Complete the required information in Special Term and Condition E (Page 17), entitled “Authorized Representatives”	hmp <hr/> Initial
<b>3. Pricing</b> – Complete Pricing Schedule on Pages 27 - 29. For each area, select whether ALL locations are to be INCLUDED; ALL locations are to be EXCLUDED; or the area is INCLUDED, but locations to be EXCLUDED therefrom have been struck through. Indicate the maximum hourly rate for the services you will provide for each area where services will be provided	hmp <hr/> Initial
<b>4. State Corporation Commission</b> – Attachment A. Complete required information. Original signature Required	hmp <hr/> Initial
<b>5. Vendor Data Sheet</b> – Attachment B. Complete required information. Original signature Required	hmp <hr/> Initial
<b>6. Appraiser Data Sheet Information</b> – Attachment D. Complete required information. Attach a copy of the Real Estate Appraiser Board of the Commonwealth of Virginia issued license and a resume for each appraiser submitting a sheet. Original signature Required	hmp <hr/> Initial
<b>7. Qualifications</b> – Specify for the Contractor’s principal by initialing to the right possession of the following, as applicable:  <input checked="" type="checkbox"/> <b>Certified General Real Estate Appraiser</b> license issued by the Real Estate Appraiser Board of the Commonwealth of Virginia  <input type="checkbox"/> <b>Certified Residential Real Estate Appraiser</b> license issued by the Real Estate Appraiser Board of the Commonwealth of Virginia  <input type="checkbox"/> <b>“Reviewer experience”</b> for any individual performing appraisal reviews, as defined in the Regulations of the Virginia Real Estate Appraiser Board; possession of their Virginia Certified General Real Estate Appraiser license or Certified Residential Real Estate Appraiser license for a minimum of two years, and; have performed a minimum of twelve (12) appraisal review assignments between January 1, 2015 and March 31, 2018	hmp <hr/> Initial  <hr/> Initial  <hr/> Initial

**COMMONWEALTH OF VIRGINIA**

Department of General Services  
Director, Central Procurement Unit  
1100 Bank Street, Suite 724  
Richmond, VA 23219  
Email: [procurement@dgs.virginia.gov](mailto:procurement@dgs.virginia.gov)  
Web: <http://www.dgs.virginia.gov>

**CONTRACTOR**

Valucentric LLC  
2361 Edgeview Lane  
Midlothian, VA 23113  
Tel.: 804-638-3330  
Fax: 410-543-0664  
Email: hplacer@valucentric.com

- F. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting Contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial Contract period is for more than 12 months, the resulting Contract may also be terminated by the Contractor, without penalty, after the initial 12 months of the Contract period upon 60 days written notice to the other party. Any Contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- G. **AWARD:** The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The award(s) will be made to the lowest responsive and responsible bidder(s) meeting the requirements of the solicitation. The Commonwealth reserves the right to conduct any tests it may deem advisable and to make all evaluations. The Commonwealth also reserves the right to reject any or all bids, in whole or in part, to waive informalities and to delete items prior to making the award, whenever it is deemed in the sole opinion of the procuring public body to be in its best interest.
- H. **BANKRUPTCY:** If Contractor becomes insolvent, takes any step leading to its cessation as a going concern, fails to pay its debts as they become due, or ceases business operations continuously for longer than fifteen (15) business days, then the Commonwealth may immediately terminate this Contract on notice to Contractor, unless Contractor immediately gives the Commonwealth adequate assurance of the future performance of this Contract or the applicable order. If bankruptcy proceedings are commenced with respect to Contractor, and if this Contract has not otherwise terminated, then the Commonwealth may suspend all further performance of this Contract until Contractor assumes this Contract and provides adequate assurance of performance thereof or rejects this Contract pursuant to Section 365 of the Bankruptcy Code or any similar or successor provision, it being agreed by the Commonwealth and Contractor that this is an executory Contract. Any such suspension of further performance by the Commonwealth pending Contractor's assumption or rejection shall not be a breach of this Contract, and shall not affect the rights of the Commonwealth to pursue or enforce any of its rights under this Contract or otherwise.
- I. **BID PRICES:** Bid prices shall be in the form of a hourly rate price for each item during the Contract period.
- J. **BREACH:** The Contractor shall be deemed in breach of this agreement if the Contractor:
1. Fails to provide any service by the specified delivery date;

As defined in the Bid Notes, pricing shall be per Order in response to a solicitation for Appraisal Services specified in a SOW and shall be FOB Destination, and ALL INCLUSIVE for all expenses for a "not to exceed" amount)

Please mark the following chart to indicate those geographic areas in which you would be willing to offer to perform Appraisal Services. You may specify counties, cities or towns to be excluded from an area for which you would be willing to offer to perform Appraisal Services, if you choose to be more specific.



CONTINUED ON NEXT PAGE

**SERVICES AND PRICING SCHEDULE**

Area	Service		
	Appraisal Report	Appraisal Report Review	Appraisal Consultation
<p><b>Area(s) where Bidder will provide Appraisal Services. (Mark your selection with an "X" and, if so choosing, identify any excluded locations from the Area by striking through the location listed to the left)</b></p> <p><b>#1 – Bristol</b>  <b>Counties:</b> Bland, Buchanan, Dickenson, Grayson, Lee, Russell, Scott, Smyth, Tazewell, Washington, Wise and Wythe  <b>Cities:</b> Bristol, Norton  <b>Towns:</b> Abingdon, Appalachia, Big Stone Gap, Bluefield, Cedar Bluff, Chilhowie, Cleveland, Clinchco, Clinchport, Clintwood, Coeburn, Damascus, Duffield, Dunganon, Fries, Gate City, Glade Spring, Grundy, Haysi, Honaker, Independence, Jonesville, Lebanon, Marion, Nickelsville, Pennington Gap, Pocahontas, Pound, Richlands, Rural Retreat, Saltville, St. Charles, St. Paul, Tazewell, Troutdale, Weber City, Wise and Wytheville  <input type="checkbox"/> Include All of the Area <input checked="" type="checkbox"/> Exclude All of the Area  <input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p> <p><b>#2 – Salem</b>  <b>Counties:</b> Bedford, Botetourt, Carroll, Craig, Floyd, Franklin, Giles, Henry, Montgomery, Patrick, Pulaski and Roanoke  <b>Cities:</b> Galax, Martinsville, Radford, Roanoke and Salem  <b>Towns:</b> Bedford, Blacksburg, Boones Mill, Buchanan, Christiansburg, Dublin, Fincastle, Floyd, Glen Lyn, Hillsville, Narrows, New Castle, Pearisburg, Pembroke, Pulaski, Rich Creek, Ridgeway, Rocky Mount, Stuart, Troutville and Vinton  <input type="checkbox"/> Include All of the Area <input checked="" type="checkbox"/> Exclude All of the Area  <input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p> <p><b>#3 – Lynchburg</b>  <b>Counties:</b> Amherst, Appomattox, Buckingham, Campbell, Charlotte, Cumberland, Halifax, Nelson, Pittsylvania and Prince Edward  <b>Cities:</b> <del>Danville</del>; Lynchburg  <b>Towns:</b> <del>Atlatavista</del>; Amherst; Appomattox, Brookneal, Charlotte Court House, Chatham, Dillwyn, Drakes Branch, Farmville, Gretna, Halifax, Hurt, Keysville, Pamplin City, Phenix, Scottsburg, South Boston and Virgilia  <input type="checkbox"/> Include All of the Area <input type="checkbox"/> Exclude All of the Area  <input checked="" type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	<p>\$ _____/Hour</p>	<p>\$ _____/Hour</p>	<p>\$ _____/Hour</p>
	<p>\$ _____/Hour</p>	<p>\$ _____/Hour</p>	<p>\$ _____/Hour</p>
	<p>\$ 250 _____/Hour</p>	<p>\$ _____/Hour</p>	<p>\$ 250 _____/Hour</p>

Area(s) where Bidder will provide Appraisal Services. (Mark your selection with an "X" and, if so choosing, identify any excluded locations from the Area by striking through the location listed to the left)	Service		
	Appraisal Report	Appraisal Report Review	Appraisal Consultation
<p><b>#4 – Richmond</b></p> <p><b>Counties:</b> Amelia, Brunswick, Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, Lunenburg, Mecklenburg, New Kent, Nottoway, Powhatan and Prince George</p> <p><b>Cities:</b> Colonial Heights, Hopewell, Petersburg and Richmond</p> <p><b>Towns:</b> Alberta, Ashland, Blackstone, Boydton, Brodnax, Burkeville, Chase City, Clarksville, Crewe, Kenbridge, La Crosse, Lawrenceville, McKenney, South Hill and Victoria</p> <p><input checked="" type="checkbox"/> Include All of the Area   <input type="checkbox"/> Exclude All of the Area</p> <p><input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ 250 /Hour	\$ ____/Hour	\$ 250 /Hour
<p><b>#5 – Norfolk</b></p> <p><b>Counties:</b> Accomack Isle of Wight, James City, Northampton, Southampton, Surry, Sussex, York and Greensville.</p> <p><b>Cities:</b> Chesapeake, Emporia, Franklin, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach and Williamsburg</p> <p><b>Towns:</b> Accomac, Belle Haven, Bloxom, Boykins, Branchville, Cape Charles, Capron, Cheriton, Chincoteague, Claremont, Courtland, Dendron, Eastville, Exmore, Hallwood, Ivor, Jarratt, Keller, Melfa, Nassawadox, Newsoms, Onancock, Onley, Painter, Parksley, Saxis, Smithfield*, Stony Creek, Surry, Tangier, Wachapreague, Wakefield, Waverly and Windsor</p> <p><input checked="" type="checkbox"/> Include All of the Area   <input type="checkbox"/> Exclude All of the Area</p> <p><input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ 250 /Hour	\$ ____/Hour	\$ 250 /Hour
<p><b>#6 – Fredericksburg</b></p> <p><b>Counties:</b> Caroline, Essex, Gloucester, King and Queen, King George, King William, Lancaster, Mathews, Middlesex, Northumberland, Richmond, Spotsylvania, Stafford and Westmoreland</p> <p><b>Cities:</b> Fredericksburg</p> <p><b>Towns:</b> Bowling Green, Colonial Beach, Irvington, Kilmarnock, Montross, Port Royal, Tappahannock, Urbanna, Warsaw, West Point and White Stone</p> <p><input checked="" type="checkbox"/> Include All of the Area   <input type="checkbox"/> Exclude All of the Area</p> <p><input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ 250 /Hour	\$ ____/Hour	\$ 250 /Hour

Area(s) where Bidder will provide Appraisal Services. (Mark your selection with an "X" and, if so choosing, identify any excluded locations from the Area by striking through the location listed to the left)	Service		
	Appraisal Report	Appraisal Report Review	Appraisal Consultation
<p><b>#7 – Culpeper</b></p> <p><b>Area</b>  <u>Countries:</u> Albemarle, Culpeper, Fauquier, Fluvanna, Greene, Louisa, Madison, Orange and Rappahannock  <u>Cities:</u> Charlottesville  <u>Towns:</u> Culpeper, Gordonsville, Louisa, Madison, Mineral, Orange, Remington, Scottsville, Stanardsville, The Plains, Warrenton and Washington</p> <p><input checked="" type="checkbox"/> Include All of the Area   <input type="checkbox"/> Exclude All of the Area  <input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ 250 /Hour	\$ ____/Hour	\$ 250 /Hour
<p><b>#8 – Staunton</b></p> <p><b>Area</b>  <u>Countries:</u> Alleghany, Augusta, Bath, Clarke, Frederick, Highland, Page, Rockbridge, Rockingham, Shenandoah and Warren  <u>Cities:</u> Buena Vista, Covington, Harrisonburg, Lexington, Staunton, Waynesboro and Winchester  <u>Towns:</u> Berryville, Boyce, Bridgewater, Broadway, Clifton Forge, Craigs ville, Dayton, Edinburg, Elkton, Front Royal, Glasgow, Goshen, Grottoes, Iron Gate, Luray, Middletown, Monterey, Mount Crawford Mount, Jackson, New Market, Shenandoah, Stanley, Stephens City, Strasburg, Timberville, Toms Brook and Woodstock</p> <p><input type="checkbox"/> Include All of the Area   <input checked="" type="checkbox"/> Exclude All of the Area  <input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ ____/Hour	\$ ____/Hour	\$ ____/Hour
<p><b>#9 – Northern Virginia</b></p> <p><b>Area</b>  <u>Countries:</u> Arlington, Fairfax, Loudoun and Prince William  <u>Cities:</u> Alexandria, Fairfax, Falls Church, Manassas and Manassas Park  <u>Towns:</u> Clifton, Dumfries, Hamilton, Haymarket, Herndon, Hillsboro, Leesburg, Lovettsville, Middleburg, Occoquan, Purcellville, Quantico, Round Hill and Vienna</p> <p><input checked="" type="checkbox"/> Include All of the Area   <input type="checkbox"/> Exclude All of the Area  <input type="checkbox"/> Include the Area, But Exclude Localities stricken through as reflected above.</p>	\$ 250 /Hour	\$ ____/Hour	\$ 250 /Hour

**ATTACHMENT A  
VIRGINIA STATE CORPORATION COMMISSION (SCC) FORM**

**Virginia State Corporation Commission ("SCC") Registration must be completed and returned  
with the Bid**

**The undersigned Offeror:**

is a corporation or other business entity with the following SCC identification number: \_\_\_\_\_.

-OR-

is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust

-OR-

is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become Contracts, and not counting any incidental presence of the Offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the Contracts by which such goods were sold and shipped into Virginia from Offeror's out-of-state location)

-OR-

is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the *Code of Virginia*.

**\*\* NOTE \*\***

Check this box if you have not completed any of the foregoing options, but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals.\*

**Signature:** \_\_\_\_\_  


**Name:** \_\_\_\_\_  
Heather Placer  
(Print)

**Title:** \_\_\_\_\_  
Regional Vice President

**Name of Firm:** \_\_\_\_\_  
Valucentric, LLC

**Date:** \_\_\_\_\_  
4/19/18

**\* THE COMMONWEALTH, IN ITS SOLE DISCRETION, RESERVES THE RIGHT TO DETERMINE  
WHETHER TO ALLOW SUCH A WAIVER.**

**ATTACHMENT B  
VENDOR DATA SHEET**

**Note: The following information is required as part of your response to this bid. Failure to submit all information requested may result in the purchasing agency requiring prompt submission of missing information. The vendor must have the capability and capacity in all respects to fully satisfy all of the contractual requirements.**

1. Vendor's Primary Contact:

Name: Heather Placer Phone: 804-638-3330

2. Years in Business: Indicate the length of time you have been in business providing this type of goods or services:

19 Years 10 Months

3. Vendor Information:

FIN or FEI Number (If Company, Corporation, or Partnership): 47-0980453

Social Security Number (If Individual): \_\_\_\_\_

4. Indicate below a listing of at least three (3) current or recent accounts, either commercial or governmental, that your company is servicing, has serviced, or has provided similar goods and/or services. Include the length of service and the name, address, and telephone number of the point of contact.

a. Company: VDOT/I 66 Express Mobility Partners Contact: Ed Williams

Address: 12600 Fair Lake Circle, Suite LL11, Fairfax, VA 22033

Phone: (571) 373-1668 Email: ewilliams@i66emp.com

Project: Interstate 66 Right of Way Project

Dates of Service: 10/01/17-Present \$ Value: Various

b. Company: Virginia Credit Union Contact: \_\_\_\_\_

Address: PO Box 90010, Richmond, VA 23225 Email: \_\_\_\_\_

Phone: (804) 267-1464 jennifer.bonniface@vacu.org

Project: Various Commercial Appraisals for Purchase and Refinancing

Dates of Service: 6/1/2007-Present \$ Value: Various

c. Company: Virginia Commonwealth University Contact: Mitzi Lee

Address: PO Box 843040, Richmond, VA 23220

Phone: (804) 828-9177 Email: leem3@vcu.edu

Project: Various appraisals for acquisitions

Dates of Service: 1/1/07-11/1/2016 \$ Value: Various

**I certify the accuracy of this information.**

Signed:  Title: Regional Vice President

**ATTACHMENT C  
SMALL BUSINESS SUBCONTRACTING PLAN**

It is the goal of the Commonwealth that more than 42% of its purchases be made from small businesses. All potential Bidders are required to submit a Small Business Subcontracting Plan.

**Small Business:** "Small business (including micro)" means a business, which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date for bids. This shall also include DSBSD-certified women- and minority-owned businesses when they also hold a DSBSD certification as a small business on the bid due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at [www.DSBSD.virginia.gov](http://www.DSBSD.virginia.gov) (Customer Service).

Heather Placer, Valucentric LLC

**Bidder Name:** \_\_\_\_\_

**Preparer Name:** \_\_\_\_\_ Heather Placer

**Date:** \_\_\_\_\_ 4/19/18

**Instructions**

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form. This includes but is not limited to DSBSD-certified women-owned and minority-owned businesses when they have also received DSBSD small business certification.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the Bidder to receive credit for the small business subcontracting plan evaluation criteria, the Bidder shall identify the portions of the Contract that will be subcontracted to DSBSD-certified small business for the initial Contract period in Section B.

Bidders which are small businesses themselves will receive the maximum available points for the small business participation plan evaluation criterion, and do not have any further subcontracting requirements.

Bidders which are not certified small businesses will be assigned points based on proposed expenditures with DSBSD-certified small businesses for the initial Contract period in relation to the Bidder's total price for the initial Contract period.

Points will be assigned based on each Bidder's proposed subcontracting expenditures with DSBSD certified small businesses for the initial Contract period as indicated in Section B in relation to the Bidder's total price.

**Section A**

If your firm is certified by the Department of Small Business and Supplier Diversity (DSBSD), provide your certification number and the date of certification):

Certification Number: \_\_\_\_\_ n/a \_\_\_\_\_ Certification Date: \_\_\_\_\_

**Section B – Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

Populate the table below to show your firm’s plans for utilization of DSBSD-certified small businesses in the performance of this Contract for the initial Contract period in relation to the bidder’s total price for the initial Contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that this proposed participation will be incorporated into the subsequent contract and will be a requirement of the Contract. Failure to obtain the proposed participation percentages may result in breach of the Contract.

Micro/Small Business Name & Address DSBSD Certificate #	Status if Micro/Small Business is also: Women (W), Minority (M)	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement During Initial Period of the Contract	Planned Contract Dollars During Initial Period of the Contract (\$ or %)
n/a					
<b>Totals \$</b>					

**ATTACHMENT D**  
**Real Estate Appraiser Data Sheet**

By my signature below, I hereby certify and warrant to the factual accuracy of the responses in this Attachment D, and to provide Appraisal Services as stipulated in this Contract, and at the accepted Bid pricing.

Signature: \_\_\_\_\_ 

Name in which appraiser holds Virginia license: Heather Marie Placer

License Number: 4001005440

License Held (Attach a copy of the active license):

- Certified General Real Estate Appraiser
- Certified Residential Real Estate Appraiser
- Licensed Residential Real Estate Appraiser
- Appraiser Trainee

1. I certify and warrant that there is no complaint on file or pending against me or my firm with the Virginia Real Estate Appraiser Board that may be grounds for disciplinary action under 18 VAC 130-20-160. (If there is, then Bidder please attach any supporting documentation or information with your Bid about the filing that you would like considered)
2. I certify that there has been no finding by the Virginia Real Estate Appraiser Board, including via a Consent Order, against me or my firm in the past five (5) years, which provided grounds for disciplinary action under 18 VAC 130-20-160. (If there is, then Bidder is to attach a separate sheet identifying the case number(s), the violation(s) and the sanction(s) together with any additional information about the finding that you would like considered)
3. If you would like to be evaluated for performing appraisal reviews, do you have "reviewer experience," as defined in the Regulations of the Virginia Real Estate Appraiser Board, and have you held your current Virginia Certified General Real Estate Appraiser license or Certified Residential Real Estate Appraiser license for a minimum of two years and have you performed a minimum of twelve appraisal review assignments between January 1, 2015 and March 31, 2018?  No  Yes n/a
4. Have you completed training in application of the current edition of UASFLA that was approved for appraiser continuing education credit?  No  Yes (Woody Fincham has)
5. For each appraiser performing services under the Contract please provide a copy of their license and a resume that includes:
  - a. any professional designations held
  - b. education and appraisal related coursework
  - c. Experience with detail of any particular specialty or expertise regarding property type, intended use, specific appraisal guidelines (e.g., UASFLA, Uniform Act), analytical method or other area and of any experience reviewing appraisals. Such description should include the length of time performing such specialty or developing such expertise and the approximate number of the related assignments over an identified period of time.



Department of General Services  
Central Procurement Unit  
1100 Bank Street  
Suite 724  
Richmond, VA 23119

May 11, 2018

ADDENDUM NO. 1 TO ALL BIDDERS

Reference – Invitation for Bids: IFB #TCW-2018-0416  
Commodity: Appraisal Services  
Dated: April 16, 2018  
Bids Due: **June 5, 2018 (REVISED)**  
Pre-bid Conference: April 26, 2018 (HELD)

The below is hereby changed to read:

1. Reference Cover Page, Due Date/Time, revise to read: “**Due Date/Time: June 5, 2018 – 11:00 A.M. EST.**”
2. Reference Special Term and Condition, Paragraph U, entitled ‘Identification of Bid Envelope’, revise to read:

**IDENTIFICATION OF BID ENVELOPE:** The **signed** IFB response must be returned in a separate sealed envelope and identified as follows:

Vendor Name	
Street or Box Number	POSTAGE*
City, State, Zip Code	
	Department of General Services ATTN Tiffany C. Walker, VCA Consolidated Procurement Unit (CPU) 1100 Bank St STE 724 Richmond VA 23219
IFB #:	TCW-2018-0416
IFB Title:	Appraisal Services
Due Date:	June 5, 2018
Time:	11:00 A. M. EST
DSBSD #:	_____

\*If an IFB response is mailed, the Bidder takes the risk that the envelope, even if marked as described above, may be inadvertently opened and the information compromised which may cause the response to be disqualified. IFB responses delivered that require an “Additional Postage Due” payment will not be accepted.



Department of General Services  
Central Procurement Unit  
1100 Bank Street  
Suite 724  
Richmond, VA 23119

IFB responses may be hand delivered to the designated location in the office issuing the solicitation.

No other correspondence or other IFB response should be placed in the envelope.

Note: A signed acknowledgment of this addendum must be received at the location indicated on the IFB either prior to the bid due date and hour or attached to your bid. Signature on this addendum does not substitute for your signature on the original bid document. The original bid document must be signed.

Respectfully,

Tiffany C. Walker /s/  
[tiffany.walker@dgs.virginia.gov](mailto:tiffany.walker@dgs.virginia.gov)  
Contracting Officer

Valucentric, LLC

Name of Firm

Heather Placer, Regional VP

Printed Name and Title

[Handwritten Signature]

Signature

6/17/18

Date

## MEMBER PROFILE


[View Resume >>](#)
**Heather M. Placer, MAI, SRA**
[tricegrp.com](http://tricegrp.com)

Valucentric

Regional Vice President

2361 Edgeview Lane

Midlothian, VA 23113

(804) 638-3330

Fax: (757) 345-0170

Cell: (804) 638-3330

[hplacer@tricegrp.com](mailto:hplacer@tricegrp.com)
[Continuing Education Program Completed](#)
[Standards & Ethics Education Completed](#)
[Accepts Fee Assignments](#)
**Primary Market Area**

Richmond area, Southside Virginia, Hampton Roads, Northern North Carolina, Greensboro, Raleigh

**Secondary Market Area**

Remainder of Virginia and North Carolina

**Primary Practice Focus**

My primary practice focus is on commercial, industrial, and agricultural (non residential land) type properties in the states of Virginia and North Carolina.

**Business Services**

[Absorption Studies \[View Experience Details\]](#) • 
 [Appraisal](#) • 
 [Appraisal Review](#) • 
 [Consulting](#) • 
 [Data and Information Analysis](#) • 
 [Demand Analysis](#) • 
 [Demographic Analysis](#) • 
 [Development Valuation and Consultation](#) • 
 [Easement Analysis](#) • 
 [Encroachment Analysis](#) • 
 [Feasibility Studies](#) • 
 [FHA Appraisal](#) • 
 [Foreclosure / REO](#) • 
 [Highest and Best Use Studies](#) • 
 [Litigation / Litigation Support](#) • 
 [Market Analysis](#) • 
 [Portfolio Valuation and Analysis](#) • 
 [Relocation Appraisal and Consulting](#) • 
 [Retrospective Valuation](#)

COMMONWEALTH of VIRGINIA

Department of Professional and Occupational Regulation  
9900 Mayland Drive, Suite 400, Richmond, VA 23233  
Telephone: (804) 367-8500

EXPIRES ON  
08-31-2018

NUMBER  
4001005440

REAL ESTATE APPRAISER BOARD

CERTIFIED GENERAL REAL ESTATE APPRAISER



HEATHER MARIE PLACER  
604 BRISTOL VILLAGE WAY 307  
MIDLOTHIAN, VA 23114



*Jerry W. DeBoer*  
JERRY W. DEBOER  
Director

Status can be verified at <http://www.dpor.virginia.gov>

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

DPOR LIC (04/2014)



## ***Curriculum Vitae***

**HEATHER M. PLACER, MAI, SRA, CCIM**

**Regional Vice President-The Trice Group, A Valuentric Company**

### **OFFICE:**

ADDRESS: 1003 Mt. Hermon Road, Suite 201, Salisbury Maryland 21804  
PHONE: 888.440.VALU (8258)  
FAX – Residential: 888.450.VALU (8258)  
FAX – Commercial: 888.504.VALU (8258)  
WEB: [www.tricegrp.com](http://www.tricegrp.com) [www.valuentric.com](http://www.valuentric.com)  
EMAIL: [hplacer@tricegrp.com](mailto:hplacer@tricegrp.com)

### **EDUCATION:**

- ❖ 1999: Old Dominion University, Bachelor of Business Administration, Management
- ❖ 2001: Old Dominion University, Masters of Business Administration
- ❖ 2007: Virginia Commonwealth University, Masters of Real Estate Valuation
- ❖ 2004: Appraising Manufacturing Housing
- ❖ 2006: Appraising Apartment Appraisal, Concepts and Applications
- ❖ 2006: Self Storage Economics
- ❖ 2006: Appraising Convenience Stores
- ❖ 2009: The Appraiser as an Expert Witness
- ❖ 2010: Discounted Cash Flow
- ❖ 2010: Report Writing and Valuation Analysis
- ❖ 2011: Fundamentals of Separating Real Property, Personal Property and Intangible Business Assets
- ❖ 2013: Business Practice and Ethics
- ❖ 2015: Condemnation Appraising
- ❖ 2015: Litigation Appraising
- ❖ Ongoing: Adjunct Professor for Virginia Commonwealth University School of Business (Real Estate)

### **PROFESSIONAL AFFILIATIONS:**

- ❖ Appraisal Institute
  - 2010: MAI designated member
  - 2009: SRA designated member
  - 2014-2016: Leadership Development Advisory Council (LDAC)
  - 2014-2016: National Diversity Committee
  - Virginia Commonwealth Chapter: President Elect (2018) Vice President (2017), Treasurer (2016), Secretary (2014, 2015); , Candidate Guidance Chair (2013), Finance Chair (2016)
  - Appraisal Institute Journal Editorial Committee, 2017-2019
- ❖ CCIM (April, 2017)
- ❖ Argus
  - Certified, 2012
- ❖ Virginia Certified General Appraiser: #4001 005440
- ❖ North Carolina Certified General Appraiser: #A6138
- ❖ Virginia Real Estate Salesperson #0225084311
- ❖ HUD Approved Appraiser
- ❖ Lake Gaston Junior Women's Club, Founding President (2013-2015)
- ❖ Lee District GFWC (General Federation of Women's Clubs) Director of Junior Women's Clubs (2016-2018)
- ❖ GFWC Virginia State Camp Easter Seals Chair (2016-2018)
- ❖ Cinderella Dreams, Chair, 2017
- ❖ Member, Women's Council of Realtors, 2016-Current

### **EXPERIENCE:**

- ❖ 1993-1998: Research Assistant, Virginia Carolina Appraisal Company, Inc.
- ❖ 1998-2007: Staff Appraiser, Virginia Carolina Appraisal Company, Inc.
- ❖ 2007-2011: Senior Appraiser, MG Miller Valuations.
- ❖ 2011-2016: Director, Valbridge | Axial Advisory Group
- ❖ 2016-Present: Regional Vice President, The Trice Group (A Valucentric Company)
- ❖ 2016-Present: Commercial Specialist, Long and Foster
- ❖ 2010-Present: Adjunct Professor, Virginia Commonwealth University

COMMONWEALTH of VIRGINIA

Department of Professional and Occupational Regulation  
9960 Mayland Drive, Suite 400, Richmond, VA 23233  
Telephone: (804) 367-8500

EXPIRES ON  
04-30-2018

NUMBER  
4001002868

REAL ESTATE APPRAISER BOARD

CERTIFIED GENERAL REAL ESTATE APPRAISER



LELAND B TRICE  
12546 OCEAN REEF DRIVE  
BERLIN, MD 21811

DPOR

*Jay W. DeBoer*  
Jay W. DeBoer, Director

Status can be verified at <http://www.dpor.virginia.gov>

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

DPOR-LIC (05/2015)

MEMBER PROFILE

---

[View Resume >>](#)**Leland B. Trice, SRA**[www.tricegrp.com](http://www.tricegrp.com)

The Trice Group, LLC

Principal

1003 Mt. Hermon Road

Suite 201

Salisbury, MD 21804

(410) 543-1030x2031

Fax: (410) 543-0664

Cell: (410) 430-9341

[ltrice@tricegrp.com](mailto:ltrice@tricegrp.com)Continuing Education Program CompletedStandards & Ethics Education CompletedAccepts Fee Assignments**Primary Market Area**

Residential: Maryland, Delaware, DC, Virginia, Pennsylvania; Commercial: Maryland, Delaware, Virginia. Full details at [www.tricegrp.com](http://www.tricegrp.com)

**Primary Practice Focus**

Primary Focus is residential real estate valuation with lesser capacity for small commercial/industrial property types.

**Business Services**

Absorption Studies • Appraisal • Appraisal Review • Consulting • Data and Information Analysis • Demand Analysis • Demographic Analysis • Feasibility Studies • FHA Appraisal • Foreclosure / REO • Highest and Best Use Studies • Litigation / Litigation Support • Market Analysis • Mortgage Lending Consulting • Relocation Appraisal and Consulting • Retrospective Valuation



## *Curriculum Vitae*

### **LELAND B. TRICE, SRA, MRICS**

#### **OFFICE:**

ADDRESS: 1003 Mt. Hermon Road, Suite 201, Salisbury Maryland 21804  
PHONE: 888.440.8258  
FAX – Residential: 888.450.8258  
FAX – Commercial: 888.504.8258  
WEB: [www.tricegrp.com](http://www.tricegrp.com)  
EMAIL: [info@tricegrp.com](mailto:info@tricegrp.com)

#### **EDUCATION:**

- ❖ 1987: University of Maryland, College Park: Bachelor of Arts in Economics
- ❖ 1987: American Institute of Real Estate Appraisers (AIREA): Real Estate Appraisal Principles
- ❖ 1987: AIREA: Highest and Best Use
- ❖ 1988: AIREA: Standards of Professional Practice
- ❖ 1988: AIREA: Residential Valuation
- ❖ 1990: AIREA: Basic Valuation
- ❖ 1991: Appraisal Institute (AI): Income Capitalization, Part A
- ❖ 1991: AI: Income Capitalization, Part B
- ❖ 1992: AI: Currently Regulatory Techniques
- ❖ 1993: AI: Reporting Complex Residential Properties
- ❖ 1995: Residential Case Study
- ❖ 1996 - Present: Ongoing continuing education as required by licensing.
- ❖ Ongoing: Instructor at Wor-Wic Community College for Appraisal Topics
- ❖ Ongoing: Instructor for Allterra Group, LLC

#### **PROFESSIONAL AFFILIATIONS:**

- ❖ Appraisal Institute
  - 1992: SRA designated member
  - 1998, 1999: Young Advisory Council (YAC)

- 2001: Leadership Development Advisory Council (LDAC)
- 2002: LDAC – Discussion Leader
- 2003: LDAC – Vice Chair
- 2004: LDAC – Chair
- 2004: Long Range Planning Committee
- 2002 – 2004: Grievance Committee – Chair
- 2004-2008: AI Reports Development Team – (Chair 2004-2005)
- ❖ Royal Institution of Chartered Surveyors
  - 2008: MRICS designated member
- ❖ National Association of Realtors: GRI designation
- ❖ Maryland Certified General Appraiser: #04-3222
- ❖ Delaware Certified General Appraiser: #X1-0000100
- ❖ Virginia Certified General Appraiser: #4001 002868
- ❖ Maryland Real Estate Broker: #21567
- ❖ HUD Approved Appraiser
- ❖ Salisbury University Foundation Board of Directors
  - Treasurer & Executive Committee
  - Investment Committee

**EXPERIENCE:**

- ❖ 1985: Apprenticeship with Independent Appraisals, Inc.
- ❖ 1985 - 1987: Staff Appraiser with Kern Realty & Appraising, Inc.
- ❖ 1987 - 1995: Co-Owner, Trice Appraisal, Inc.
- ❖ 1995 - 2007: Owner, Trice Valuation Services, LLC
- ❖ 2008 - 2009: Principal, Valuescape LLC
- ❖ 2009 – Present: Principal, The Trice Group, LLC
- ❖ 1990 – Present: Litigation Consultant / Expert Witness

# COMMONWEALTH of VIRGINIA

Department of Professional and Occupational Regulation  
9960 Mayland Drive, Suite 400, Richmond, VA 23233

Telephone: (804) 367-8500

EXPIRES ON

03-31-2020

NUMBER

4001008056

## REAL ESTATE APPRAISER BOARD

### CERTIFIED RESIDENTIAL REAL ESTATE APPRAISER

WOODY R FINCHAM  
14 LAFAYETTE DRIVE  
PALMYRA, VA 22963



*Jay W. DeBoer*  
Jay W. DeBoer, Director

Status can be verified at <http://www.dpor.virginia.gov>

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)



COMMONWEALTH of VIRGINIA  
Department of Professional and Occupational Regulation

REAL ESTATE APPRAISER BOARD  
CERTIFIED RESIDENTIAL REAL ESTATE APPRAISER  
NUMBER: 4001008056 EXPIRES: 03-31-2020

(FOLD)



WOODY R FINCHAM  
14 LAFAYETTE DRIVE  
PALMYRA, VA 22963

DPOR-LIC (02/20)  
(DETACH HERE)

DPOR-PC (02/2017)

Status can be verified at <http://www.dpor.virginia.gov>

## MEMBER PROFILE


[View Resume >>](#)
**Woody R. Fincham, SRA, AI-RRS**
[www.tricegrp.com/](http://www.tricegrp.com/)

The Trice Group

Vice President: VA Regional Manager

14 Lafayette Dr

Palmyra, VA 22963

(757) 750-7877

Fax: (410) 543-0664

Cell: (757) 750-7877

[wfincham@tricegrp.com](mailto:wfincham@tricegrp.com)
[Continuing Education Program Completed](#)
[Standards & Ethics Education Completed](#)
[Accepts Fee Assignments](#)
**Primary Market Area**

Charlottesville City, Greene County, Fluvanna

**Secondary Market Area**

Orange County, Waynesboro, Newport News, Hampton, York County, Chesapeake, Norfolk, Virginia Beach, Portsmouth, Suffolk, Poquoson

**Business Services**

[Appraisal \[View Experience Details\]](#) • 
 [Appraisal Review](#) • 
 [Asset Management](#) • 
 [Consulting](#) • 
 [Education](#) • 
 [Feasibility Studies](#) • 
 [FHA Appraisal](#) • 
 [Foreclosure / REO](#) • 
 [Highest and Best Use Studies](#) • 
 [Litigation / Litigation Support](#) • 
 [Market Analysis](#) • 
 [Mass Appraisal](#) • 
 [Mortgage Lending Consulting](#) • 
 [Public / Private Partnership Consulting and Valuation](#) • 
 [Relocation Appraisal and Consulting](#) • 
 [Retrospective Valuation](#) • 
 [Statistical Modeling](#)

# ***Curriculum Vitae***

## **Woody Fincham, SRA, AI-RRS**

1248 B Breezemont Dr  
Charlottesville, VA 22911  
757-750-7877  
[woody@woodyfincham.com](mailto:woody@woodyfincham.com)

### **EDUCATION:**

- ❖ 2015: AI-RRS Designation
- ❖ 2013: Bachelors of Science, Business Administration
- ❖ 2011: SRA Designation
- ❖ 2004: Associate in Arts
- ❖ 2000-Present: Ongoing continuing education as required by licensing and SRA

Ongoing: Instructor for Appraisal Institute, Residential Topics (Admitted 2014)

Ongoing: Instructor for Altera Group, LLC

Ongoing: Various speaking engagements and lectures

### **PROFESSIONAL AFFILIATIONS:**

- ❖ Appraisal Institute
  - 2014: LDAC – Discussion Leader Topic:
    - “Defining and Promoting the AI Designated Member Difference”
  - 2015: Virginia Commonwealth Chapter (VCCAI) Government Relations Committee Member
  - 2015-16: VCCAI Board of Directors Member
  - 2015: Admissions and Designation Qualifications Committee; Designated Member (National Appraisal Institute committee)
- ❖ Virginia Association of Assessing Officers (VAAO)
  - 2015: Education Committee Member
- ❖ 2015: Admissions and Designation Qualifications Committee, Designated
- ❖ Virginia Certified Residential Appraiser: #4001008056
- ❖ 2013: HRCAI Education Committee Member
- ❖ 2012-present: Experience Screening Panel AI: SRA Screener
- ❖ 2011-13: Leadership Development Advisory Council (LDAC)2001
- ❖ 2002 – Present: Litigation Consultant / Expert Witness
- ❖ HUD Approved Appraiser

**EXPERIENCE:**

- ❖ 2015- Present Vice President, Virginia Manager The Trice Group, LLC
- ❖ 2014-2015 Virginia Taxation Department: Senior Land Preservation Tax Credit Consultant (conservation easement and historical facade easement review)
- ❖ 2013-2014: Deputy Assessor, Albemarle County, VA
- ❖ 2011-2013: Deputy Assessor, Suffolk, VA Assessor's Office
- ❖ 2009-2011: Staff Appraiser, Newport News, VA Assessor's Office
- ❖ 2009: Appraiser, (Residential and Commercial), Braun & Associates, Knoxville, TN
- ❖ a la mode, inc
  - 2007-2009 Labs Member
  - 2009-Present Beta Group
  - Education Developer (present)
- ❖
- ❖ 2004 - 2015: Founder, Chief Appraiser FM & Associates
- ❖ 2002-2004: Staff Appraiser; Managing Appraiser, Messina & Associates, INC Virginia Beach, VA
- ❖ 2000-2002: Staff Appraiser, Elder Appraisal Services, LLC Norfolk, VA
- ❖ 1999-HERS Certified Energy Rater
- ❖ 1998-2001 FHA 203(k) Construction Consultant

**Published:**

**Why "Just Any" Residential Appraiser Will Not Do**- March, 2014-Opinions of Value Blog  
**Help For Appraisers Worried About Collateral Underwriter**-December, 2014 Appraisal Buzz  
**Highest and Best Use is More Than Just a Check Box**- December, 2014 Appraisal Buzz  
**Appraising The Right Way Part 1: Requiem for a Dream**- March, 2014 3 Approaches Blog



# McGOWAN PROGRAM ADMINISTRATORS

Domestic Headquarters • Old Forge Centre  
20595 Lorain Road • Fairview Park, Ohio 44126  
P: 800.545.1538 • F: 440.333.3214 • www.mcgowanins.com

Atlanta Austin Chicago Cleveland Dallas Eatontown, NJ Huntsville Long Island Minneapolis New York City Phoenix San Diego Seattle

April 6, 2017

Valucentric, LLC  
1003 Mt Hermon Rd, Ste 201  
Sallsbury, MD 21804

RE: Real Estate Appraisers Errors and Omlssions Insurance  
Named Insured: Valucentric, LLC  
Issued By: Navigators Insurance Company  
Policy Number: PH16RELM01679IV  
Policy Term: 09/19/2016 – 09/19/2017  
Retroactive Date: 08/14/2014

To Whom It May Concern:

Please be advised that per Section III. Definitions (K)(2) of the policy, "Insured means: 1. The Named Insured; [and] 2. Any past or present partner, principal, shareholder, officer, director, member, employee or independent contractor and their employees, but only for claims arising from professional services performed on behalf of the Named Insured" (*emphasis omitted*).

In addition, the following entitles are insureds under the above referenced errors and omissions insurance policy. Please note, this policy excludes all claims arising out of acts or omissions of such entity(s) that were committed before the retroactive date shown:

<u>Entity:</u>	<u>Retroactive Date:</u>
• Tom Schurer	12/01/2009
• Chicago Appraisal Center, Inc	04/14/2010
• Howard B Richter & Associates, Inc.	04/05/2017
• JSG Real Estate Services, Inc.	04/05/2017
• Real Valuation Services, LLC	04/05/2017
• The Trice Group, LLC	04/05/2017

The above should not be viewed as an affirmation or denial of coverage available under the policy for a particular claim matter, as a coverage determination can only be made at the time a claim is submitted.

Nothing contained in this letter will serve to expand the coverage afforded by the policy or to increase the exposure of the Issuing company.

If you require anything further, please call our office at 800-545-1538.

Sincerely,

**Neil Patrick McGowan Esq., M.B.A.**  
National Program Manager - Real Estate Agents & Appraisers E&O Program  
McGowan Program Adminlstrators

All policies bound through McGowan & Company, Inc. and its Trading Names • Admitted to practice in all 50 States

Blacksmith's Insurance Services  
Blacksmiths of Boston Insurance Services  
Insurance Providers Consortium  
McG&C Insurance Brokerage  
McGowan & Company Insurance Services, Inc  
McGowan & Company, Inc.  
McGowan Excess & Casualty

McGowan Insurance Brokerage of California, Inc  
McGowan Insurance Brokerage of Massachusetts  
McGowan Insurance Services of California  
McGowan Insurance Services of New York  
McGowan Insurance Services of Texas, Inc.  
McGowan Insurance Underwriters  
McGowan Program Administrators  
McGowan Insurance Services

McGowan, Donnelly & Oberheu, LLC  
Phelan Risk Mnnagement Service Company  
Program Management Service Company  
Program Managers International, Inc.  
Statehouse Casualty Managers, Inc.  
The McGowan Holdings Group, Ltd  
The Windward Group, Inc

**NAVIGATORS INSURANCE COMPANY**

**THIS IS A CLAIMS MADE INSURANCE POLICY.**

**THIS POLICY APPLIES ONLY TO THOSE CLAIMS THAT ARE FIRST MADE AGAINST THE INSURED DURING THE POLICY PERIOD. ALL CLAIMS MUST BE REPORTED IN WRITING TO THE COMPANY DURING THE POLICY PERIOD OR WITHIN 60 DAYS AFTER THE END OF THE POLICY PERIOD.**

**PLEASE READ THIS POLICY CAREFULLY.**

**REAL ESTATE PROFESSIONAL ERRORS AND OMISSIONS INSURANCE POLICY  
DECLARATIONS**

**POLICY NUMBER:** PH16RELM01679IV **RENEWAL OF:** PH15RELM01679IV

1. **NAMED INSURED:**  
Valucentric LLC
  
2. **ADDRESS:**  
1003 Mt Hermon rd Ste 201  
Sallsbury, MD 21804
  
3. **POLICY PERIOD: FROM:** 09/19/2016 **TO:** 09/19/2017  
12:01 A.M. Standard Time at the address of the **Named Insured** as stated in Number 2 above.
  
4. **LIMITS OF LIABILITY:**

	\$ 1,000,000	Per Claim
	\$ 1,000,000	Annual Aggregate
  
5. **DEDUCTIBLE:** \$ 1,000
  
6. **PREMIUM:** \$ 748.00  
**TAXES:** \$ \$
  
7. **RETROACTIVE DATE:** 08/14/2014

8. **FORMS ATTACHED:**

NAV REL DEC	Real Estate Professionals Declarations
NAV REL NIC PF	Real Estate Professionals Policy
NAV REL 025	Claims Expenses Inside the Limits of Liability
NAV REL 300 MD	Maryland Amendatory
MD PREM NOTICE	Notice to Applicants In Maryland Regarding Cancellation and Premium Recalculation
NAV-ML-002	OFAC Endorsement

**PROGRAM ADMINISTRATOR:**

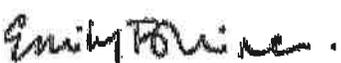


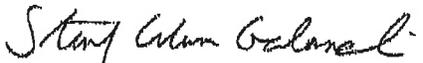
McGowan Program Administrators  
(A Division of McGowan & Company, Inc.)  
20595 Lorain Road, Suite 300  
Fairview Park, OH 44126  
(440) 333-6300

By Acceptance of this policy the Insured agrees that the statements in the Declarations and the Application and any attachments hereto are the Insured's agreements and representations and that this policy embodies all agreements existing between the Insured and the Company or any of its representatives relating to this insurance.

---

IN WITNESS WHEREOF, we have caused this policy to be signed by our President and Secretary.

  
[Emily Miner]  
Secretary

  
[Stanley A. Galansk]  
President

# Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

**1** Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Valucentric, LLC**

**2** Business name/disregarded entity name, if different from above

**3** Check appropriate box for federal tax classification; check only one of the following seven boxes:  
 Individual/sole proprietor or single-member LLC  
 Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ P  
 C Corporation  
 S Corporation  
 Partnership  
 Trust/estate  
 Other (see instructions) ▶  
 Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.

**4** Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
 Exempt payee code (if any) \_\_\_\_\_  
 Exemption from FATCA reporting code (if any) \_\_\_\_\_  
*(Applies to accounts maintained outside the U.S.)*

**5** Address (number, street, and apt. or suite no.)  
**1003 Mount Hermon Road, Suite 201**

**6** City, state, and ZIP code  
**Salisbury, MD 21804**

**7** List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

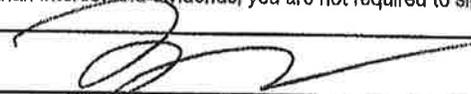
Social security number									
			-						
or									
Employer identification number									
4	7	-	0	9	8	0	4	5	3

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification Instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

**Sign Here** Signature of U.S. person ▶ 

Date ▶ 1/9/2017

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.  
 Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

COMMONWEALTH of VIRGINIA

Department of Professional and Occupational Regulation

9960 Mayland Drive, Suite 400, Richmond, VA 23233

Telephone: (804) 367-8500

EXPIRES ON  
12-31-2019

NUMBER  
4008001935

REAL ESTATE APPRAISER BOARD  
APPRAISAL BUSINESS REGISTRATION



VALUCENTRIC, LLC  
1003 MT HERMAN ROAD  
SUITE 201  
SALISBURY, MD 21804



*Jay W. DeBoer*  
Jay W. DeBoer, Director

Status can be verified at <http://www.dpor.virginia.gov>

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

DPOR-LIC (02/2017)

(DETACH HERE)

**DPOR** COMMONWEALTH of VIRGINIA  
Department of Professional and Occupational Regulation

REAL ESTATE APPRAISER BOARD  
APPRAISAL BUSINESS REGISTRATION  
NUMBER: 4008001935 EXPIRES: 12-31-2019

VALUCENTRIC, LLC  
1003 MT HERMAN ROAD  
SUITE 201  
SALISBURY, MD 21804



(FOLD)

Status can be verified at <http://www.dpor.virginia.gov>

DPOR-PC (02/2017)

# Commonwealth of Virginia



## State Corporation Commission

### CERTIFICATE OF FACT

*I Certify the Following from the Records of the Commission:*

That Valucentric, LLC, a limited liability company organized under the law of Delaware, obtained a certificate of registration to transact business in Virginia from the Commission on July 27, 2016; and

That it is registered to transact business in the Commonwealth of Virginia as of the date set forth below.

Nothing more is hereby certified.

*Signed and Sealed at Richmond on this Date:*

*February 1, 2018*

*Joel H. Peck*

*Joel H. Peck, Clerk of the Commission*

